

REC—Emergency PRA Clearance (CRM Tool Screenshots)

Reports: Home ~ salesforce.com - Enterprise Edition - Microsoft Internet Explorer

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Setup Help & Train

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Reports Home Tell me more! Help for this page

Enter keywords to find matching custom reports.

Report Folders

Folder:

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My Personal Custom Reports

Untitled Public Reports

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Dashboard Reports

[Edit](#) | [Del](#) | [Export](#) [QNC: # of NonPPCP's at Milestones by REC](#)

[Edit](#) | [Del](#) | [Export](#) [QNC: # of Opportunities by REC](#)

[Edit](#) | [Del](#) | [Export](#) [QNC: # of PPCP's at Milestones by REC](#)

[Edit](#) | [Del](#) | [Export](#) [REC: # of Providers at Each Milestone](#)

[Edit](#) | [Del](#) | [Export](#) [REC: Opportunities by Stage](#)

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Standard CRM Reports

[Edit](#) | [Del](#) | [Export](#) [Activities: All my RECs Activities](#) - Shows all activities for all members of your REC. Shows both Open and Completed Activities.

[Edit](#) | [Del](#) | [Export](#) [Activities: My Closed Activities](#) - This report shows all your completed activities

[Edit](#) | [Del](#) | [Export](#) [Activities: My Open Activities](#) - Shows all Activities that are assigned to you that are still open.

[Edit](#) | [Del](#) | [Export](#) [Cases: My RECs Open and Closed Cases](#) - Shows all Cases submitted by members of your REC.

[Edit](#) | [Del](#) | [Export](#) [Cases: My RECs Open Cases](#) - Shows all Open Cases submitted by your REC. Use this report to track how many outstanding issues you have submitted to your PO.

[Edit](#) | [Del](#) | [Export](#) [Lead: All Leads for my REC](#) - Shows all Leads for your REC. Leads with a Lead Status of "New" still need to be contacted.

[Edit](#) | [Del](#) | [Export](#) [Lead: Lead Lifetime Report](#) - This report shows all Converted Leads for your REC. The report will also show the Organization, Contact and Opportunity created at Lead conversion.

[Edit](#) | [Del](#) | [Export](#) [Lead: Leads by Source](#) - Use this report to see where your Leads are being generated. When Users enter the "Lead Source" for their Leads you can see the Lead Source in this report.

[Edit](#) | [Del](#) | [Export](#) [Lead: My Leads](#) - Shows all of the Leads you own with a Lead Status of "New Lead". You can use this report to pull a list of your new Leads that need to be contacted.

[Edit](#) | [Del](#) | [Export](#) [Milestone: All Providers at Milestones](#) - This report will show the total number of Providers at each Milestone for your REC.

[Edit](#) | [Del](#) | [Export](#) [Milestone: Non-PPCP's at Milestones](#) - This report will show the total number of Non-Priority Primary Care (Non-PPCP's) Providers at each Milestone for your REC.

[Edit](#) | [Del](#) | [Export](#) [Milestone: PPCP's at Milestones](#) - This report will show the total number of Priority Primary Care (PPCP's) Providers at each Milestone for your REC.

[Edit](#) | [Del](#) | [Export](#) [Oppty: All Opportunities for my REC](#) - Use this report to see a list of all the Opportunities owned by everyone in your REC.

[Edit](#) | [Del](#) | [Export](#) [Oppty: My Opportunities by Stage](#) - This report will show all of the Opportunities you own sorted by their Stage.

[Edit](#) | [Del](#) | [Export](#) [Org: All Organizations with Demographics](#) - This report will include all data points around demographics.

[Edit](#) | [Del](#) | [Export](#) [Organization: Closed List Organizations](#) - Use this report to show all Organizations you have contacted who did not want to sign an agreement with the REC.

Content Search
 Workspaces
 Search

- Recent Items**
- Massachusetts Technology Park Cooperation
 - Rhode Island Quality Institute
 - Jennie Chiller
 - Kristen Doherty
 - Cedric Priebe, MD
 - Gary Christensen
 - Laura Adams
 - Rick Shoup

[Recycle Bin](#)

Content Workspaces
 Overview
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Use the tabs below to view and manage shared workspaces or your personal workspace.

Shared Content | My Personal Content

My Workspaces

Actions	Workspace Name
Browse	CoP - Communications and Outreach
Browse	CoP - Financials and Operations
Browse	CoP - Implementation and Project Mgmt
Browse	CoP - Interoperability and HIE
Browse	CoP - Meaningful Use
Browse	CoP - Privacy and Security
Browse	CoP - Project Directors
Browse	CoP - Salesforce.com CRM
Browse	CoP - Vendor Selection/Group Purchasing
Browse	CoP - Workflow Redesign

Popular Tags
 Sort Alphabetically | Sort By Popularity

American Recovery and Re... Answers ARRA ARRA Reporting certification Communications Communities of Practice
Community of Practice contact information CRM CRM Lead **Cycle 1** Education and Outreach
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 Implementation Leads Mat Kendall Meaningful Use Meeting Minutes Office of Provider Adopti...
 Office of the National Co... outreach Presentation
 Privacy and Security REC **REC Kick-Off Meeting**
 REC Leads Salesforce training
 Vendor Selection and Grou...

Top Content Category: Publication Date

Title	Author	Publication Date
New York EHR Meaningful Use Summit Flyer	Micky Tripathi	16 hours ago
NYeC REC Outreach Agent Certification 05-Apr-2010 clean	Micky Tripathi	16 hours ago
NYeC REC Implementation Agent Certification 05-Apr-2010	Micky Tripathi	16 hours ago
Outreach Agent Data Template 04-02-2010	Micky Tripathi	16 hours ago
Implementation Agent Data Template 30-Mar-2010	Micky Tripathi	16 hours ago
NYeC REC Agent Certification 06-Apr-2010	Micky Tripathi	16 hours ago
http://finance.yahoo.com/news/New-Yorks-Primary-Care-bw...	Micky Tripathi	16 hours ago
NYeC REC Outreach Agent Kickoff 06-May-10 v1	Micky Tripathi	17 hours ago
NYeC REC Implementation Agent Kickoff 06-May-10 v3	Micky Tripathi	17 hours ago

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- Micky Tripathi published New York EHR Meaningful Use Summit Flyer into CoP - Communications and Outreach 16 hours ago
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 - Micky Tripathi published Outreach Agent Data Template 04-02-2010 into CoP - Implementation and Project Mgmt 16 hours ago
 - Micky Tripathi published Implementation Agent Data Template 30-Mar-2010 into CoP - Implementation and Project Mgmt 16 hours ago

Milestone
 All Providers at Milestones
 Help for this Page

Report Generation Status: The report returned no results.

Report Options:

Summarize information by: Milestone View: All organizations

Time Frame
 Columns: Created Date Duration: Current FY
 Start Date: 1/1/2010 End Date: 12/31/2010

Run Report Hide Details Customize Save As Printable View Export Details

Generated Report:

Filtered By: **Edit**
 Primary Contact Record Type equals Provider **Clear**
 AND Participating Provider equals True **Clear**
 AND Milestone not equal to - **Clear**

Organization Name First Name Last Name 1: Sign-Up 2: Go-Live 3: Meaningful Use
 Grand Totals (0 records)

Check rows above to filter to just those rows, then drill down by: --None-- **Drill Down**



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REC CRM

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All RECs [New REC](#)

Create New View Refresh A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

Action	REC Name	Main REC Phone	Mailing City	Mailing State
Edit	Altarum Institute, Michigan	(734) 302-4600	Ann Arbor	MI
Edit	Arkansas Foundation For Medical Care	(501) 212-8616	Little Rock	AR
Edit	CalHIPSO (North)			
Edit	CalHIPSO (South)			
Edit	CIMRO of Nebraska	(402) 476-1700	Lincoln	NE
Edit	Colorado Regional Extension Center	(720) 285-3200	Denver	CO
Edit	District of Columbia Primary Care Association			DC
Edit	Fund for Public Health, New York			NY
Edit	Greater Cincinnati HealthBridge (Ohio-Kentucky)			OH
Edit	HealthInsight, Utah-Nevada	(800) 483-0932	Salt Lake City	UT
Edit	Iowa IFMC	(800) 373-2964	West Des Moines	IA
Edit	Kansas Foundation for Medical Care, Inc.	(785) 273-2552	Topeka	KS
Edit	Key Health Alliance (Stratis Health), Minnesota North			MN
Edit	Lovell Clinic, New Mexico			NM
Edit	Massachusetts Technology Park Cooperation	(617) 371-3999	Somerville	MA
Edit	MetaStar, Inc., Wisconsin	(608) 729-2700	Madison	WI
Edit	Morehouse School of Medicine, Inc., Georgia	(404) 752-1015	Atlanta	GA
Edit	New York eHealth Collaborative (NYeC)			NY
Edit	Northern Illinois University	(815) 753-1136	DeKalb	IL
Edit	Northwestern University	(312) 503-2986	Chicago	IL
Edit	OCHIN Inc. (Primary), Oregon	(503) 943-2500	Portland	OR
Edit	Ohio Health Information Partnership	(614) 340-1839	Columbus	OH
Edit	Oklahoma Foundation for Medical Quality, Inc.		Oklahoma City	OK
Edit	Purdue University	(765) 496-1911	West Lafayette	IN
Edit	Qsource (Tennessee)	(866) 514-8595	Nashville	TN

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